

# CLENExchange

March 2003

"School ends, but education doesn't."

Volume 19, Number 3

## Secret Patrons and Virtual Field Trips: The Sequel

by Mary Bucher Ross, Training and Development Managing Librarian, Seattle Public Library (mary.ross@spl.org)

In the December 2002 issue of the CLENExchange, I wrote about a training program that I designed for the Washington State Virtual Reference Project ("Secret Patrons and Virtual Field Trips: Adventures in Training Staff for Virtual Reference"). At that time, we had just completed the train-the-trainer sessions and two classes were about to begin—one in Seattle, the other in Spokane. Since then, we have trained over 50 people throughout the state. The project coordinator, Buff Hirko, and I gave a presentation on the training at the 2002 Virtual Reference Desk Conference in Chicago.

The recognition that the training has received since then is due mainly

### Inside this issue:

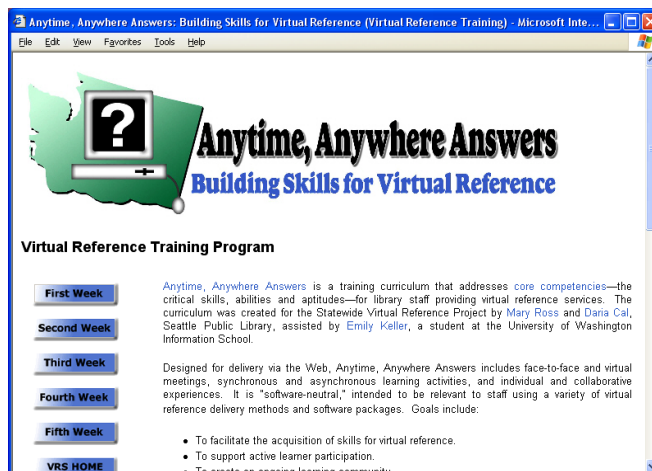
Toronto Preconference.....	3
FISH! Phenomenon.....	4
Training Resources.....	6
Children's Manual.....	7

to a unique blend of activities that explore virtual reference from the user's perspective.

The training program—called Anytime, Anywhere Answers—is a blended curriculum, combining a one-day face-to-face orientation with five weeks of distance learning activities.

At the orientation the trainers offer previews of the curriculum, hands-on experience with chat meeting software, and tips for success in distance learning. In addition to preparing the learners for the on-line activities that will follow, the focus is on encouraging interaction. Common experiences and interests are shared via a get-acquainted game called Walking Billboards (from *Still More Games Trainers Play*).

Three primary on-line tools are used to deliver the training. A Web site maintained by the



Washington State Library contains the complete curriculum. A listserv is set up for each class. The third tool is weekly chat meetings, building chat skills using two different programs—first, free Web-based AOL Instant Messaging, then the 24/7 Reference on-line meeting software.

These on-line tools deliver training effectively to every part of the state. By providing the entire course content on the Web, learners can access it anytime, anywhere. The listserves are used for posting and comment-

ing on assignments, sharing observations, and offering additional resources. Chat meetings allow real-time interaction focused on pre-arranged topics. Using chat-based on-line meeting software means that the learners gain valuable experience in the same mode of communication used by their virtual reference patrons. And they have to deal with the same technical problems and limitations.

The weekly assignments encourage a view of virtual reference through the eyes of users. Each learner is

See Sequel continued on page 2

**CLENExchange** is the official publication of the Continuing Library Education Network and Exchange Round Table (CLENERT) of the American Library Association.

It is distributed free to members of CLENERT and is published quarterly in September, December, March and June.

Editor: Gail McGovern

#### CLENERT Officers

##### President:

Cheryl M. Rogers

##### Secretary:

Curtis Rogers

##### ALA Staff Liaison:

Lorelle Swader

##### Website:

[www.ala.org/alaorg/rtables/clene/](http://www.ala.org/alaorg/rtables/clene/)

##### Discussion List:

[www.ala.org/alaorg/rtables/clene/discussionlist.html](http://www.ala.org/alaorg/rtables/clene/discussionlist.html)

##### Subscription rates:

4 issues per year

U.S. and Canada

\$20 a year

Outside the U.S. and Canada

\$25 a year.

**SUBSCRIPTION** related questions (e.g. missing issues, address change) should be sent to:

Lorelle Swader  
ALA/CLENERT  
50 E. Huron Street  
Chicago, IL 60611  
Fax: 312-280-3256

Questions regarding the CLEN-Exchange **CONTENT** should be sent to:

Gail McGovern  
906 Q Street  
Sacramento, CA 95814  
Fax: 916-446-2411  
[gmcgovern@macnexus.org](mailto:gmcgovern@macnexus.org)

*Sequel continued from page 1*

responsible for taking Virtual Field Trips, exploring the Web sites of libraries providing virtual reference and answering questions about the service's "branding," accessibility, and scope. In their Secret Patron activities, the learners have specific scenarios to use with three virtual reference services, comparing the responses. The scenarios describe a type of patron, an information need, and an "escalator" question that starts with a general inquiry and progresses to a specific one. For each interaction they evaluate the effectiveness of the reference interview and the appropriateness of the answer, and give their overall impressions of the service received.

Later in the course, the learners explore popular Web-based question-answering services such as Google Answers (<http://answers.google.com>) and reflect on what they can apply to their own services.

So what are these folks learning about virtual reference, and what are they applying in their own libraries?

From the Secret Patron summaries posted to the listserve, it's clear that the learners realize how important an effective reference interview is for the success of this service. In the hundred or more Secret Patron transactions, only a relatively few virtual reference librarians successfully clarify the questions that our learners are

asking. Launching into a search without clarifying the real question leads to a surprising number of unsatisfactory or incomplete answers.

Learners frequently comment about the importance of keeping the patron informed about what is happening and the progress of the search for an answer. They experience first-hand the discomfort of not knowing whether they are still connected or how long the transaction might take.

One questioned whether the librarian was sending easy-to-find Web sources rather than taking the time to find more authoritative information to answer her question. This led to a good discussion about how information literacy can be fostered in virtual reference.

The Virtual Field Trips prompt learners to take a more critical look at their own library Web pages, reflecting on how they can be re-designed for clarity and usefulness. One library reported that their Web page on policies for virtual reference was revised based on feedback from staff participating in the training.

Bringing library staff together from all over the state, via the training, is one of the most valuable benefits. One class partnered staff from the University of Washington, a county law library, two public libraries, and a private university. Training together is a trust-building experience for those who will later collaborate in virtual refer-

*See Sequel continued on page 8*

*CLENExchange March 2003*

*Sequel continued from page 2*

ence services.

All conclude that the traditional reference skills of welcoming, clarifying, instructing, evaluating and citing sources, and following-up on patron satisfaction are essential for effective virtual reference. They are learning that each skill has a new context in the on-line environment, where there are no visual or verbal cues to the patron's reaction. The challenges are to overcome the limitations imposed by chat communication and to harness the power of interactive, point-of-need reference service.

Just as our personal experiences as library users inform our face-to-face reference skills, our experiences as users of virtual reference will build our capacity to provide this new service. For library staff planning and implementing virtual reference, Anytime, Anywhere Answers provides resources and activities to explore, practice and reflect on the skills they need.

If you want to check out the Web site for Anytime, Anywhere Answers, the URL and password can be obtained from the VRS project coordinator, Buff Hirko. She can be reached by phone at 360-704-5206 or e-mail at [bhirko@secstate.wa.gov](mailto:bhirko@secstate.wa.gov).

## CLENE Publications



### Still Available for Sale

<b>Program Planning</b>	<b>\$15.00</b>
<b>Workshop Evaluation</b>	<b>\$ 6.00</b>
<b>Focus Group Interview Manual</b>	<b>\$10.00</b>
<b>Self Assessment Guide For Children's Services</b>	<b>\$11.00</b>

---

### To order, contact:

**Lorelle Swader**  
**ALA/CLENERT Liaison**  
**Fax: 312-280-3256**  
**E-mail: [lswader@ala.org](mailto:lswader@ala.org)**

---

CLENExchange  
906 Q Street  
Sacramento, CA 95814-6416